

Time	Meeting Room	Session
Sunday		
12:00 PM - 6:00 PM		Arrivals
6:00 PM - 9:00 PM	4th Floor: Bayberry	Welcome Reception
Monday		
7:30 AM - 8:45 AM	4th Floor: Restaurant	Breakfast
8:45 AM - 9:00 AM	Red River Ballroom	Welcome Message
9:00 AM - 10:00 AM	Red River Ballroom	Keynote: General Robert Neller on Modern Leadership - Effort Matters, Character Counts
10:00 AM - 10:45 AM	Red River Ballroom	Conference Kickoff
10:45 AM - 11:00 AM		Break
11:00 AM - 12:00 PM	Red River Ballroom	Branching Out - 4U Joins the Red Oak Family Tree Discover how Red Oak and 4U together form the first Compliance Connectivity Platform—streamlining workflows, centralizing content, and reducing risk for Financial Services professionals. This strategic integration addresses fragmented systems with unified automation, search, and analytics capabilities.
11:00 AM - 12:00 PM	Newton	Turning a New Leaf: Navigating Enhancements in Registration and Licensing Management Explore the latest enhancements to the Registration and Licensing Management module, designed to streamline workflows, boost efficiency, and enhance the user experience. Learn how these updates can improve your daily operations.
12:00 PM - 1:00 PM	4th Floor: Restaurant	Lunch
1:00 PM - 2:00 PM	Red River Ballroom	Expanding Horizons - Partnership Announcement - Email and Off Channel Communications Red Oak is expanding its Supervision suite with off-channel communication capabilities with a trusted technology partner. This includes mobile messaging, collaboration tools, and email archiving—delivering comprehensive compliance coverage across modern communication channels.
1:00 PM - 2:00 PM	Newton	Inside the Oak: Exploring Essential Features Discover powerful yet often overlooked platform features designed to boost productivity and streamline workflows. This session offers tips and best practices to help users at all levels work more efficiently.

Time	Meeting Room	Session
Monday		
2:00 PM - 2:15 PM		Break
2:15 PM - 4:15 PM	Red River Ballroom	Around the Wisdom Tree: Tackling Workplace Challenges Together Wrap up day one with an engaging icebreaker session featuring roundtable discussions to foster connections, share insights, and explore solutions to common industry challenges.
4:15 PM - 4:30 PM	Red River Ballroom	Closing Remarks
6:00 PM - 9:00 PM		Off-site Dinner - Antones
Tuesday		
7:30 AM - 8:45 AM	4 th Floor: Restaurant	Breakfast
8:45 AM - 9:00 AM	Red River Ballroom	Opening Remarks
9:00 AM - 10:00 AM	Red River Ballroom	Keynote: Branching Out with Purpose - 5 Disruptive Forces Bridging Gaps and Transforming Compliance Connectivity Learn how five disruptive forces such as AI and unified data governance can transform compliance into a strategic bridge builder. Gain an actionable roadmap to turn compliance gaps into growth opportunities.
10:00 AM - 10:15 AM		Break
10:15 AM - 10:45 AM	Red River Ballroom	Getting To The Root: To AI or Not AI? That Is the Workplace Question - A Panel on Digital Decision-Making Join our panel of industry business and IT leaders as they tackle the big question: to AI or not to AI? In this session, we'll dive into the fascinating world of artificial intelligence and explore how these trailblazers are weighing its potential benefits and pitfalls for their workplaces.
10:45 AM - 11:30 AM	Red River Ballroom	Navigating the Forest: How Red Oak Is Approaching AI Three years ago, Red Oak started down the road of strategizing how we wanted to approach AI -- while maintaining our value propositions regarding decreasing time to market, reducing risk, improving accuracy, and keeping the power of AI in the hands of business users where it belongs.
11:30 AM - 12:00 PM	Red River Ballroom	Peeling Back The Bark: AI Review Demonstration with Q&A This session is all about ACTION. Instead of discussing what AI can or can't do, we'll show you. Red Oak will demo our AI solution built to support configurable workflows that fit your business—not the other way around. You're in control, and your data stays secure. Join us to see it in action.

Time	Meeting Room	Session
Tuesday		
12:00 PM - 1:00 PM	4 th Floor: Restaurant	Lunch
1:00 PM - 2:00 PM	Singer	Rule Makers: Hands-On Guide to Crafting System Rules (Red Oak LAB) Join this interactive session to master the art of writing effective system rules. Through hands-on exercises and expert tips, you'll gain the skills and confidence to handle any rule-making challenge.
1:00 PM - 2:00 PM	4 th Floor: Restaurant	The Best Tree Fort Ever: Bridging Marketing + Compliance & Breaking Down Silos Marketing and Compliance don't have to be at odds. Discover how the Red Oak and 4U partnership ends the divide by streamlining approvals for impactful, compliant marketing—driving growth with less risk and fewer headaches.
1:00 PM - 2:00 PM	Red River Ballroom	Red Oak in Action: Client Success with Red Oak Supervision Products Join this panel to hear how clients use advanced tools for social media and website monitoring to strengthen compliance and drive success.
2:00 PM - 3:00 PM	4 th Floor: Restaurant	Under the Canopy: Email and Off Channel Communications Learn how to supervise rep activity across all channels in one unified experience. This panel explores practical tools and insights for managing communication and ensuring compliance.
2:00 PM - 3:00 PM	Red River Ballroom	Seeding the Forest: AI Prompts Workshop As AI evolves, Prompt Engineering is key. Learn how to craft effective prompts to optimize results and enhance your review process.
2:00 PM - 3:00 PM	Singer	Beneath the Bark: Tools for Streamlined Disclosures Explore how Disclosure Manager and Disclosure Intelligence streamline disclosure management and boost ad compliance. This session covers key features, workflow integration, and practical insights to improve accuracy and submission quality.
3:00 PM - 3:15 PM		Break
3:15 PM - 4:15 PM	Red River Ballroom	Connected. Navigating Our Roadmap Join us to explore the strategic roadmap shaping our future, including key initiatives and long-term goals. Gain insights and alignment on where we're headed and how we plan to get there.

Time	Meeting Room	Session
Tuesday		
4:15 PM - 5:30 PM	Red River Ballroom	Sticky Note Showdown: Leaders React to Your Bright Ideas Join company leaders as they react to bold product ideas submitted by attendees. This lively, interactive session offers insight into decision-making and highlights the innovation driving our community forward.
5:30 PM - 5:45 PM	Red River Ballroom	Closing Remarks
6:30 PM - 8:30 PM		Free Networking Evening
Wednesday		
7:30 AM - 8:45 AM	4th Floor: Restaurant	Breakfast
8:30 AM - 8:45 AM	Red River Ballroom	Opening Remarks
8:45 AM - 9:45 AM	Red River Ballroom	Reading the Leaves: Reporting Excellence - Client Success Stories and Key Achievements Join us for this can't miss session where client panelists take center stage to share their triumphs in achieving reporting goals with our software. You'll hear about the challenges they faced, the creative solutions they devised, and the successes they celebrated.
8:45 AM - 9:45 AM	Singer	4U Live Interactive Demo Join this session to learn why Red Oak was so adamant about 4U joining our family tree. When you see the demo of the 4U suite of services, you will instantly recognize the value of the 4U application that revolutionized content distribution and how connecting it to a compliance workflow system is truly creating a Compliance Connectivity Platform. You don't want to miss it!
9:45 AM - 10:45 AM	Newton	From the Treetops: Leveraging Surveillance Tools to Uncover Hidden Online Presence Join us for an enlightening dive into the world of internet surveillance where we'll showcase how our cutting-edge tools reveal the secret digital lives of supervised individuals. Discover how these tools can uncover undisclosed online presences, keeping you one step ahead in the ever-evolving digital landscape. Expect a mix of humor and insight as we explore how to turn digital breadcrumbs into actionable intelligence, all while ensuring ethical and effective oversight.

Time	Meeting Room	Session
Wednesday		
9:45 AM - 10:45 AM	Red River Ballroom	Solid Oak. Rebuilding for Resilience: Lessons from Compliance System Overhauls Join our panel of seasoned clients as they recount their epic journeys through the wild world of system configuration. Learn how they navigated the twists and turns of updating their systems to keep pace with their organizations' evolving needs. From triumphs to tribulations, our panelists share their most memorable moments, practical tips, and the occasional cautionary tale about adapting technology to fit a changing business landscape.
10:45 AM - 11:00 AM	Red River Ballroom	Closing Remarks
11:00 AM		Conference Adjourns